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THE FAMILY CASE RECORD AS AN INSTRUMENT FOR  
STUDYING EDUCATIONAL PROCESS

by

Frank D. Alexander  
Administrative Specialist in Extension Studies,  
Cornell University

The Farm and Home Management Program in the State of New York has as its focus educational work with individual families with special emphasis on farm and home management. As in other States in which the farm and home unit approach is being taken, this means the individual family approach to the farm family situation. This is a significant adult educational experiment in that the situational approach to learning is paramount. For research purposes this family farm situation approach presents unusual opportunities for measuring results as well as describing and analyzing process. It is the latter - describing and analyzing process - with which this paper is concerned. The instrument for attaining this objective we have designated in the title, "The Family Case Record."

The family case record is a familiar instrument in the field of social work, but an instrument that is not without controversy with respect to content and utility for both program and research purposes. Undoubtedly, we have much to learn in this field. But this should not prevent one from experimenting with the tool.

In the New York study we expect to use this instrument in studying approximately 25 families in each of three or four counties. We would like to have had these counties scattered over the State, but since the conduct of this part of the study is dependent on the interest and cooperation of extension personnel we shall hardly attain this goal.

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As presently conceived, there will be two major parts of the case record:

(1) Basic information about the farm family, & (2) the educational process. The basic information will include data obtained from the first (benchmark) survey and from observations of the extension agents who are working with the family. The survey information will include family census, i.e., relations of members, age, sex, education, occupation, place of birth of husband and wife, income, size of operation, and certain practice indices. This information will be ordered for quick reference. The observations of the extension workers will be more subjective and will include interactional patterns among family members, standing in community or county, qualitative judgments as to abilities of husband and wife, health problems, recreational interests, religious interests, relatives, and business and family goals.

The process record is the one that will show the interaction between the extension workers and family. From it should come indications of the educational influence of the workers. The basic content of this record will be the notes which the extension workers keep on each visit or contact with the family. The content of the notes should include: (1) What the family (members present) and agent or agents discussed and did on each visit; (2) observations of workers regarding what the members present seemed to have learned on a given visit and preceding visit; decisions made at each visit and attitudes reflected; (3) specific action to be taken by family before next visit; (4) specific action to be taken by workers before next visit; (5) check on whether actions promised by family and workers at preceding visit were carried out; (6) date and purpose of next meeting; and, (7) statement of any major problem delineated on a particular visit. The actual writing of notes may not necessarily follow this outline, but an effort will be made to include all of these items. Recording these notes and obtaining the kind of content which will have significance will be the problem.

The extension workers involved as well as the research personnel will have to experiment and learn how to do this,

The research staff will probably never contact the families other than at the time of the benchmark survey. To do so would complicate the workers' relationships with the family and probably put the researchers in a direct teaching role. Periodic meetings with the extension workers will be scheduled at which, following previous review of the agent's notes on each family, the researcher will attempt to help the extension worker fill in his notes and summarize the educational process.

The crucial question which this kind of record must face is: What can one do with it after he has it? Content analysis of records of this kind is time-consuming and frustrating. I have experimented with it in a very limited way. One county agent in the Farm and Home Management Program in New York has been keeping notes on the families with which he has worked. Two of his records were examined during the course of an eight-hour day,

The following is my summarization and analysis of his notes for one of these records for a dairy farmer with a herd of 20 milk cows, capital investment of \$26,500, gross receipts of \$8,920, and labor income of \$1,706. The business analysis for the operation showed:

A. Strong points in business.

1. High production per cow.
2. Low operating cost of machinery.
3. High milk production per man hour of work.

B. Weak points in business.

1. Too much of milk check spent for feed.
2. Perhaps not enough fertilizer and lime.
3. Business too small.

The agent's record for the family covers six visits over a period of ten months. This was an average of one visit per one and two-thirds months. The longest interval between visits was four months.

SUMMARY AND ANALYSIS OF AGRICULTURAL AGENT'S CONTACT NOTES

A. Interaction between family and agent as reflected in the latter's notes.

1. Contact 1 - June 23, 1955 (operator, homemaker, and agricultural agent present).
  - a. Agent explained program to family.
  - b. Agent reviewed present bookkeeping system with family.
  - c. Agent explained how farm cash account book should be used.
  - d. Agent worked on 1955 farm inventory with family.
  - e. Agent filled out information on Labor Income Blank #40.
2. Contact 2 - July 6, 1955 (operator, homemaker, and agricultural agent present).
  - a. Agent worked with homemaker on current financial situation and, using farm business chart and State and county averages, showed her relative standing of the farm business.
  - b. Agent helped operator bring farm inventory up to date.
3. Contact 3 - November 8, 1955 (operator, homemaker and agricultural agent).
  - a. Agent worked further with family on farm inventory, explaining how it could be best done for this year and suggesting it be completed by the last of December for use in preparing 1955 farm business analysis.
4. Contact 4 - January 17, 1956 (operator, homemaker and agricultural agent present).
  - a. Agent helped family complete farm inventory.
  - b. Agent helped family complete cash account book.
  - c. Agent helped family work out part of farm business analysis.
5. Contact 5 - March 7, 1956 (operator and agricultural agent present).
  - a. Agent helped operator complete an accurate field map of farm and rented land.
  - b. Agent helped operator with dairy business organization factors and got operator to work out what he considered his strong and weak points.
  - c. Agent started operator to thinking about his future crop rotations.
6. Contact 6 - April 20, 1956 (operator, homemaker and agricultural agent present).
  - a. Discussed operator's decision not to increase herd size.
  - b. Summary of agent's notes on contact 6 of the situation on this farm:

The operator decided against increasing his herd. The agent is pleased with this decision because he considers it important. With the farmer's family labor situation limited, there are other things he should do. Operator's herd has improved faster than quality and amount of roughage. Operator agrees that most important thing to do is to increase his roughage. His feed costs are high and this would be one way to cut costs.

While operator feels size of herd is important, he will probably wait until children are older so they can help with a larger herd. In the meantime he will improve roughage so when he is in a position to increase herd, he can have a good feed supply.

Observation:

This summary of contacts gives an account of the agent's work with this family which shows generally what he is doing. The facts are probably too general and fail to reveal the actual content of discussions.

B. Action to be taken by family.

1. To finish farm records already started for 1955.
  - a. This action appears to have been completed on Contact 4 (January 17, 1956).
2. To start new cash account book in January, 1956.
  - a. Agent's notes do not mention whether this was done or not.
3. To complete farm inventory by last of December, 1955.
  - a. Family assisted by agent did this on Contact 4 (January 17, 1955).

Observation:

It can be assumed from general content of record that these three commitments were carried out, though the agent's notes were specific on only one.

C. Action to be taken by agent.

1. To help start a new cash account book in January, 1956.
  - a. On Contact 3 agent reminded family that this was to be done.
  - b. No record of its being done was reported in agent's subsequent notes.
2. To obtain a farm map for a subsequent meeting.
  - a. This map was brought to the meeting as promised.
3. To complete with operator a map of the farm.
  - a. This was done.

Observation:

Two of these commitments were carried out. There was no record of the third.

D. Major decision made by family as reflected in notes of agent.

1. Decision to finish records already started. Decision carried into action.
2. Decision to start new cash account book in January, 1956. No record as to action on this decision.
3. Decision on three goals for farm business: (1) More and better quality of roughage; (2) addition to barn; and (3) more cows. No record as to action on two of these decisions. Third one was revised (See D).
4. Decision to reject goal of increasing size of dairy herd. This decision is apparently being carried out.
5. Decision that most important goal for present should be to increase his roughage. No record as to action on this decision, although it can be inferred that it is being carried out.

Observation:

The agent's notes provide a clear statement of decisions. The process has not gone far enough to provide a record of actions relating to most of these decisions.

E. Learning of family as reflected in notes of agent. (It is obvious that the following three items are not all of the learning that has occurred but these are made explicit in the agent's notes).

1. Operator learned what some of weak points of his business were.
2. Operator discovered weakest point of his farm business - his failure to grow enough grain.
3. Operator showed he appreciated importance of having better records.

Observations:

The determination of this learning is subjective and difficult but good notes and careful content may yield some fairly reliable conclusions in this respect.

The foregoing classified summary of notes on six visits with this farm family indicates very clearly the steps which the agent has taken with the family. The agent's functions as an educator, and the consistency or lack of consistency with which he has followed through with commitments are delineated. A process of decision making comes to light. While the agent's notes were not written for research purposes but primarily to serve as a guide to his own functions, nevertheless their content definitely throws light on the educational process involved. Whether or not a number of case records of this type, designed more carefully with fuller notes, will provide classifiable material or not must await our research effort. I definitely believe that a graphic presentation of the agent's contact steps and the relevant decisions and observed learning of the family over a long period of time will yield a significant delineation of process that would reliably show the educational role of the agent.





